

# **CHRIS User Guide: Copying a Performance Plan**

**CHRIS Responsibility Required: Manager Self-Service or Performance Plan**

## **Module Overview**

**Purpose** As part of the automation of the APPAS policy, supervisors can manage performance evaluations and appraisals through CHRIS Self-service. This automation includes issuing performance plans, and conducting mid-year/interim/annual appraisals. From the Plan Information screen the user can copy performance plans from one year to the next and from one employee to another. Once they have copied the plan the user can alter the plans accordingly.

## **Menu Bar**


The menu bar is located under the address bar and provides tools needed to navigate through the self-service views.



The Home  icon will return you to the Home page

The Navigator  icon allows you to change responsibilities

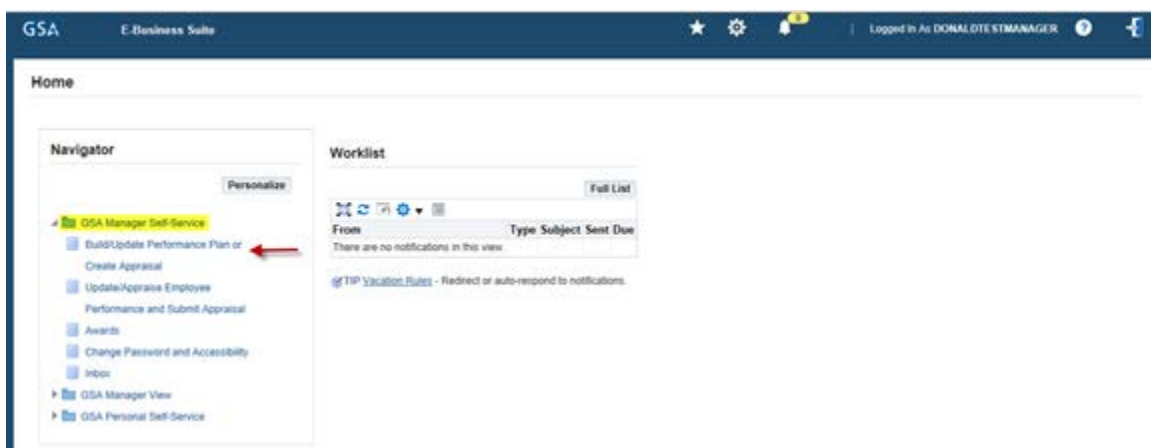
The Favorites  icon will allow you to manage your Favorites

The Notifications  icon allows you to view the notifications in your Worklist

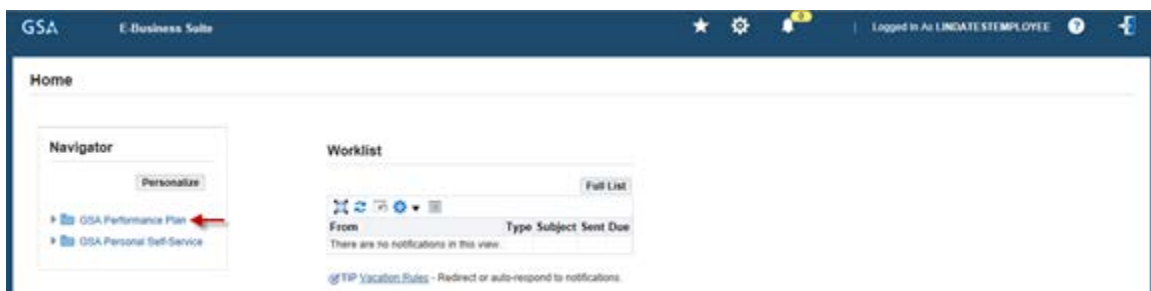
Click on the Logout  icon to exit the application

## Entering the Performance Plan Responsibility


If you are a manager, select **GSA Manager Self-Service**, then select the **Build/Update Performance Plan or Create Appraisal** menu option.

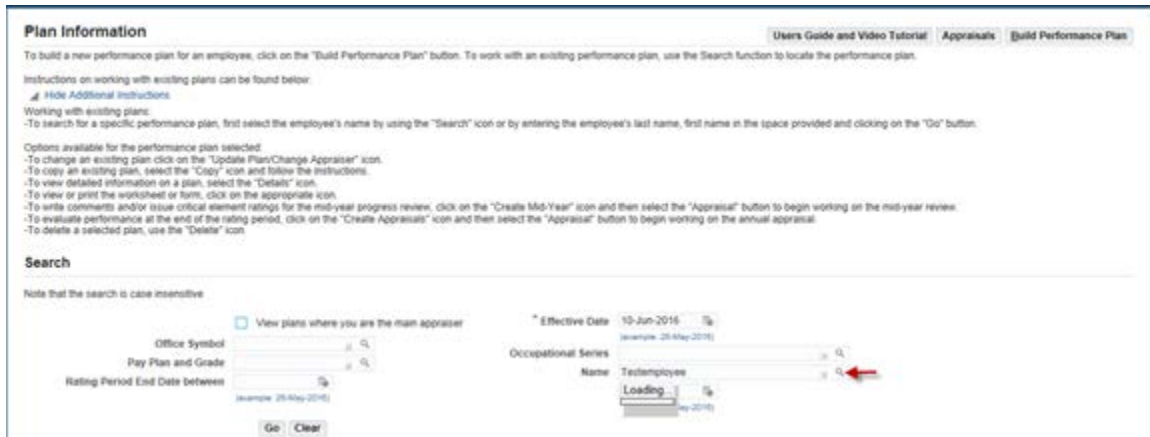



For non-supervisory employees that assist with performance plans, select **GSA Performance Plan**.

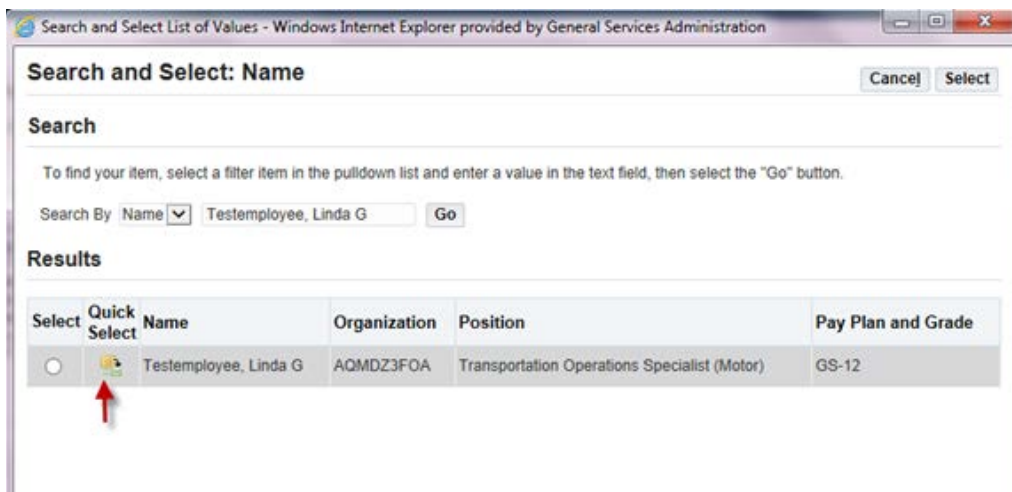



## Querying the Employee and Performance Plan

The **Plan Information** screen appears and provides multiple options for identifying the employee. If you are listed as the employee's main appraiser, you can select the box next to **Plans where you are the main appraiser**. Otherwise, the most direct way to locate an employee is to use the **Name** field. If searching the name field, type in the employee's last name, and select the Search icon .



This will take you to the **Search and Select: Name** screen. Identify the correct employee and click on the **Quick Select** icon .



Select	Quick Select	Name	Organization	Position	Pay Plan and Grade
<input type="radio"/>		Testemployee, Linda G	AQMDZ3FOA	Transportation Operations Specialist (Motor)	GS-12

Next, select the **Go** button to run the query.

**GSA Manager Self-Service** | Logged in As: DONALD.FEELMANAGER

**Plan Information** | Users Guide and Video Tutorial | Appraisals | Build Performance Plan

To build a new performance plan for an employee, click on the "Build Performance Plan" button. To work with an existing performance plan, use the Search function to locate the performance plan.

Instructions on working with existing plans can be found below:

[Hide Additional Instructions](#)

Working with existing plans:

- To search for a specific performance plan, first select the employee's name by using the "Search" icon or by entering the employee's last name, first name in the space provided and clicking on the "Go" button.

Options available for the performance plan selected:

- To change an existing plan click on the "Update Plan/Change Appraiser" icon.
- To copy an existing plan, select the "Copy" icon and follow the instructions.
- To view detailed information on a plan, select the "Details" icon.
- To view or print the worksheet or form, click on the appropriate icon.
- To write comments and/or issue critical element ratings for the mid-year progress review, click on the "Create Mid-Year" icon and then select the "Appraisal" button to begin working on the mid-year review.
- To evaluate performance at the end of the rating period, click on the "Create Appraisal" icon and then select the "Appraisal" button to begin working on the annual appraisal.
- To delete a selected plan, use the "Delete" icon.

**Search**

Note that the search is case insensitive

☐ View plans where you are the main appraiser

Office Symbol:

Pay Plan and Grade:



Rating Period End Date between:  (example: 25-May-2015)

Effective Date: 10-Jun-2015 (example: 25-May-2015)

Occupational Series:

Name: Testemployee, Linda G (example: 25-May-2015)

## Copying the Performance Plan

Before copying the plan, you can confirm the performance plan's information by selecting the **Details** icon . This will bring up the plan information. Once confirmed, select the **Copy** icon .

**Plan Information** | Users Guide and Video Tutorial | Appraisals | Build Performance Plan

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Office Symbol:





Pay Plan and Grade:

Rating Period End Date between:  (example: 25-May-2015)








Effective Date: 10-Jun-2015 (example: 25-May-2015)


Occupational Series:

Name: Testemployee, Linda G (example: 25-May-2015)

Generate Perf. Plan Form(s) |    

Select All | Select None

Select Name	Main Appraiser	Appraisal Status	Perf. Plan Type	Rating Period Start Date	Rating Period End Date	Copy	Update Plan / Change Appraiser	Details	WorkSheet	Perf. Plan Form	Create Mid-Year	Create Appraisal
<input type="checkbox"/> Testemployee, Linda G	Testname, Donald	Plan in Progress	Annual	01-Oct-2015	30-Sep-2016							

You are now viewing the **Copy Performance Plan** screen. Type in the last name of the employee that will be placed on the copied performance plan, then select the **Search** icon .

**Copy Performance Plan** Back Save Critical Element

To copy a performance plan enter the name of the employee you want to copy the plan to in the Name field, verify the beginning and end dates of the rating period and click on the Save button to copy the plan. To alter plan details click on the Critical Element button. To return to the Search screen click on the Back button.

\* Indicates required field

**Plan Information**

* Name		* Main Appraiser	
* Performance Plan Form	Non-supervisory Associates	* Performance Plan Type	Annual
* Rating Period Start Date	01-Oct-2015	* Assignment Type	Primary
* Rating Period End Date	30-Sep-2016	Appraisal Date	
Performance Plan Issue Date		PD Review Date	
Mid Year Review Date			

**Unratable Information**

☐ Unratable

Unratable Reason

Once the employee's name is selected, the **Main Appraiser** field will auto-populate with the employee's current Supervisor of Record. If the main appraiser is going to be a different manager than the one listed, then remove the auto-populated name and search for the correct main appraiser. Also, make sure that the rating period start and end dates are accurate. In this example, we have changed these dates to reflect the upcoming fiscal year. Once this is accomplished, select the **Save** button.

**GSA** GSA Manager Self Service Logged In As DONALDITE STMANAGER

**Copy Performance Plan** Back Save Critical Element

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\* Indicates required field

**Plan Information**

* Name	Testemployee, Linda G	* Main Appraiser	Testmanager, Donald
* Performance Plan Form	Non-supervisory Associates	* Performance Plan Type	Annual
* Rating Period Start Date	01-Oct-2015	* Assignment Type	Primary
* Rating Period End Date	30-Sep-2016	Appraisal Date	
Performance Plan Issue Date		PD Review Date	
Mid Year Review Date			

**Unratable Information**

☐ Unratable

Unratable Reason

If any changes must be made to the performance plan's critical elements, select the **Critical Element** button. If the plan is accurate, select the **Save** button.

**GSA** GSA Manager Self-Service Logged in As DONALDITE STMANAGER

### Update Performance Plan

To update a performance plan, fill in all of the required fields (indicated by a blue asterisk) and all dates for actions and/or meetings that have already occurred. To update or add critical elements click on the CRITICAL ELEMENTS button.

If at any point an associate becomes Unratable, check the Unratable box and enter the Unratable Reason.

\* indicates required field

**Plan Information**

* Name: TestEmployee, Michael Allen	* Main Appraiser: TestManager, Donald
* Performance Plan Form: Non-supervisory Associates	* Performance Plan Type: Annual
* Rating Period Start Date: 01-Oct-2015	* Assignment Type: Primary
* Rating Period End Date: 30-Sep-2016	Appraisal Date:
Performance Plan Issue Date:	PD Review Date:
Mid Year Review Date:	

**Unratable Information**

☐ Unratable

Unratable Reason:

To confirm that the performance plan has been successfully copied over, you can search for the employee, then select the **Go** button to run the query.

**GSA** GSA Manager Self-Service Logged in As DONALDITE STMANAGER

### Plan Information

To build a new performance plan for an employee, click on the "Build Performance Plan" button. To work with an existing performance plan, use the Search function to locate the performance plan.

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[Hide Additional Instructions](#)

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**Search**

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☒ View plans where you are the main appraiser

\* Effective Date: 13-Jun-2016

Office Symbol:

Pay Plan and Grade:

Rating Period End Date between:  -

Occupational Series:

Name: TestEmployee, Michael Allen

**Go** **Clear**

As confirmation, you will see the plan that you have just created.

## Plan Information

[Users Guide and Video Tutorial](#) [Appraisals](#) [Build Performance Plan](#)

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☒ View plans where you are the main appraiser

Office Symbol

Pay Plan and Grade

Rating Period End Date between







Effective Date

Occupational Series

Name

Go

Clear

Generate Perf. Plan Form(s) |      

Select All | Select None

Select Name	Main Appraiser	Appraisal Status	Perf. Plan Type	Rating Period Start Date	Rating Period End Date	Copy	Update Plan / Change Appraiser	Details	WorkSheet	Perf. Plan Form	Create Mid-Year	Create Appraisal
<input type="checkbox"/> TestEmployee, Michael Allen	Testmana, Donald	Plan in Progress	Annual	01-Oct-2015	30-Sep-2016	